ISAM DOCUMENTATION - DUE DILIGENCE

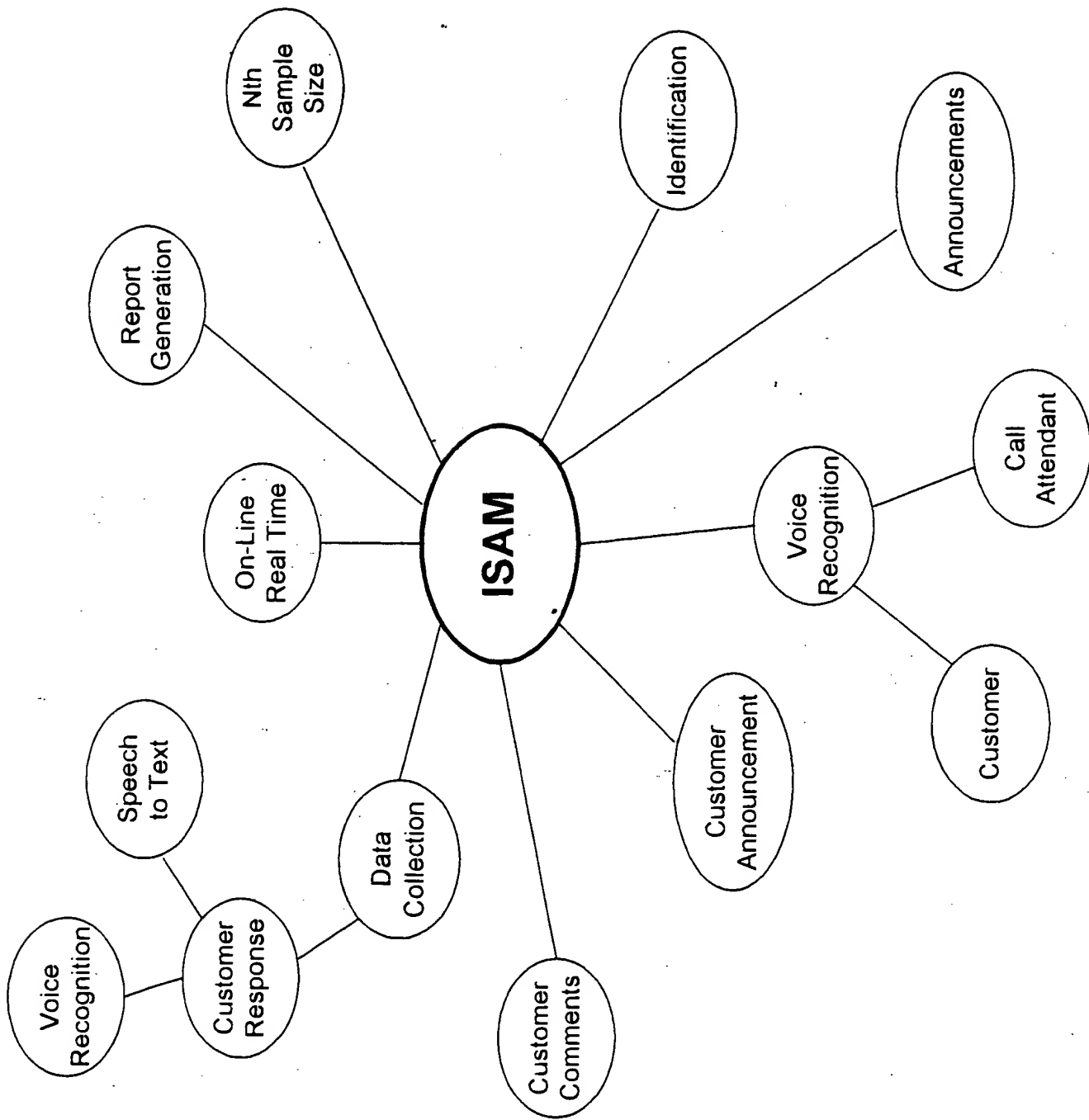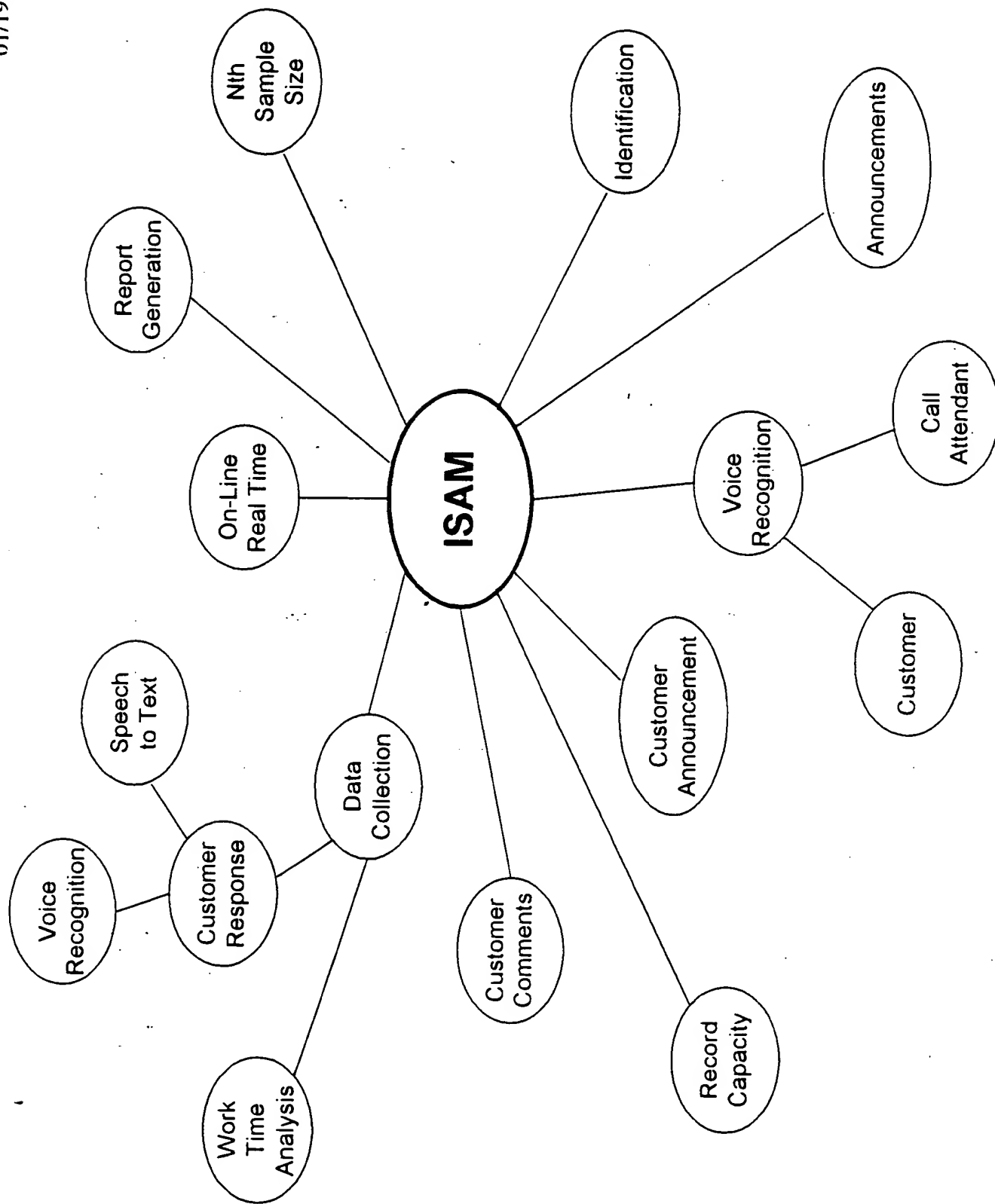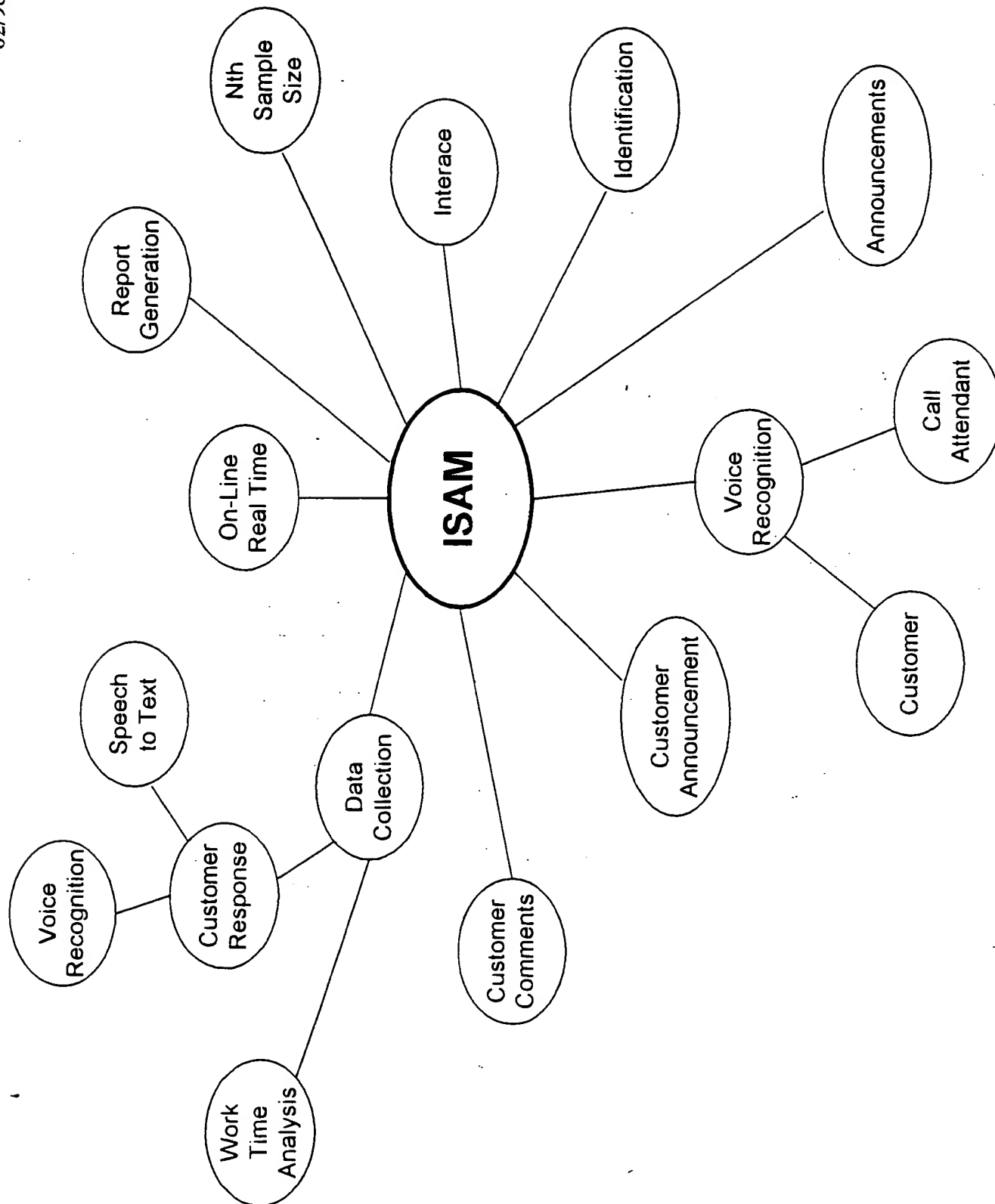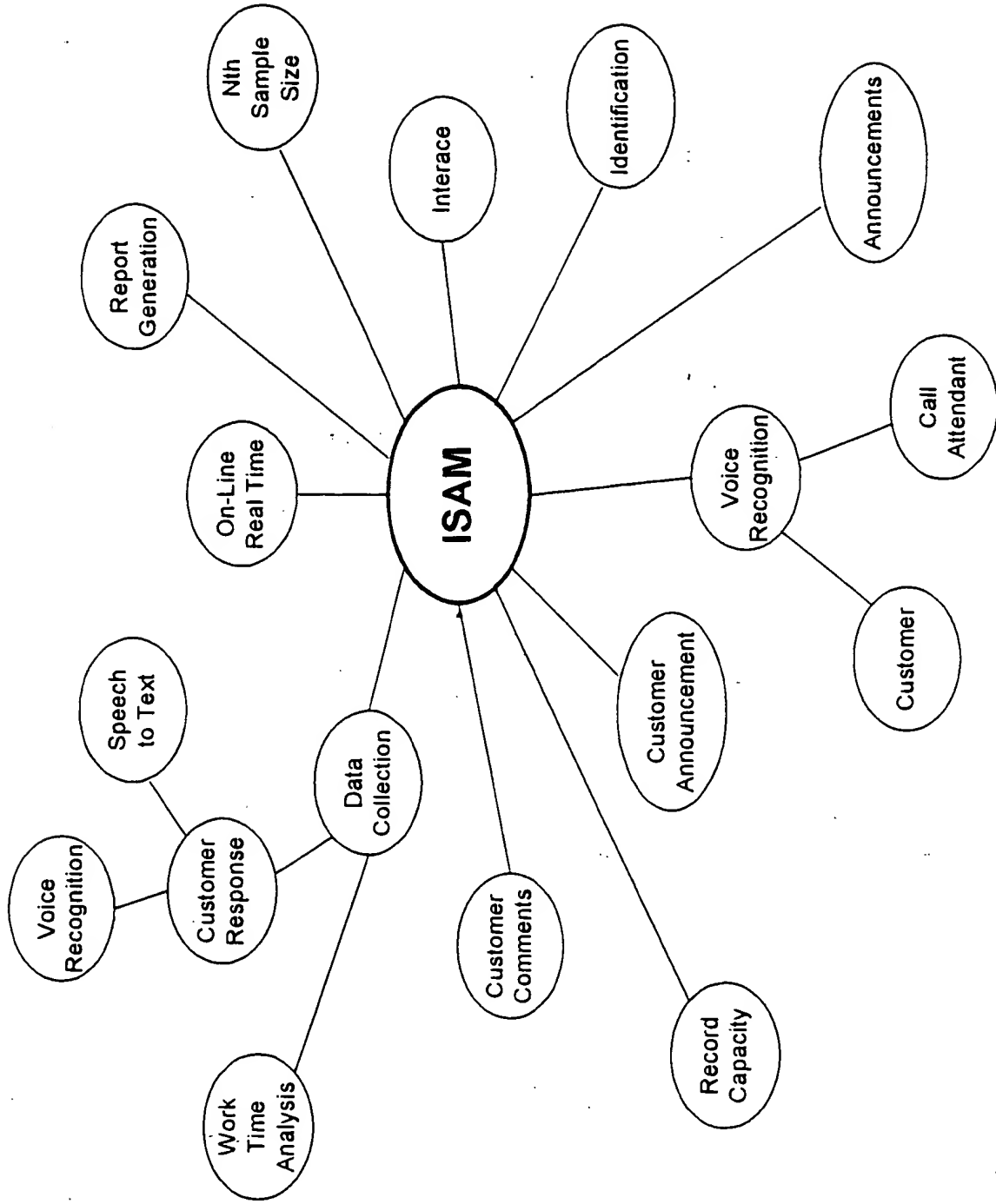| DATE	CATEGORY	DESCRIPTION
12/01/97	Technical Design	Review of ISAM technical drawing with A. McLellan.
01/01/98	Strategic Planning	ISAM 'Brain' Map - this was my technique for developing all major and supporting activities from ISAM's initial concept to market implementation. The ISAM brain map is a living document with many adds, changes and revisions. Attached.
01/01/98	Technical Design	ISAM block diagram with A. McLellan.
01/01/98	Technical Design	ISAM Advantages.
01/15/98	Market Research and Special Studies	Phase Two - Six sigma proposed study' - Prof. R. Magjuka.
02/01/98	Legal	Sample non-disclosure forms provided by Steve Lee, Don Hornback, Dr. McLellan and Scott Stuart (attorney). Signed copies in files.
03/01/98	Strategic Planning	ISAM Six Sigma goal. Attached
03/01/98	Strategic Planning	ISAM Advantage. Attached
03/01/98	Technical Design	ISAM feature requirement - with A. McLellan and Don Hornback.
03/30/98	Legal	Non-Disclosure for Don Hornback
04/01/98	Meetings & Presentations	Volt Delta software and hardware developers - Orange County, CA 4-2-98 to 4-3-98. Tape recording, minutes by Don Hornback, Non-Disclosure forms, travel documents, etc. Eight Volt Delta employees in attendance.
04/01/98	Technical Design	ISAM announcement system requirements and capacity.
04/02/98	Legal	Non-Disclosure for Volt Delta
04/02/98	Technical Design	Volt Delta DSS design. Notes from Don Hornback.
05/01/98	Meetings & Presentations	Jack Sears - VP Continental Insurance. Race Day in Suite 36 for 'Indianapolis 500'. Six sigma market potential for call centers. No specific ISAM mention but a 'market research' opportunity.
05/01/98	Strategic Planning	USADA Expense Reduction and Pricing memo for PSR, DFALT, ICAP and ISAM. ISAM is shown as intangible expense savings. Attached DA industry estimate.
05/01/98	Technical Design	ISAM data recording requirements - revised.
06/01/98	Strategic Planning	USADA Product Summary with ISAM. Attached.
06/01/98	Technical Design	ISAM report generation. Recommendation of many 'report generation' programs. SPSS, etc. meetings with S. Stuart, Don Hornback, A. Miller to review Volt Delta stat pack.
07/01/98	Market Research and Special Studies	USAA recommended as best candidate for ISAM - A. Miller & McLellan & Associates
08/01/98	Strategic Planning	Request for Price Quotation - Prof. Alden McLellan (McLellan & Associates) recommendation for ISAM RPQ. Attached.
11/01/98	Market Research and Special Studies	ISAM 'Survey questions' - ROS memo
11/01/98	Technical Design	ISAM capacity requirements. A. McLellan memo.
12/01/98	Market Research and Special Studies	ISAM study for announcement seconds. E. Feld.
12/01/98	Technical Design	ISAM announcements.

12/01/98	Technical Design	ISAM post First Office Application features.
01/13/99	Meetings & Presentations	Charles Townsend. Local investor with interest in ISAM. Non-Disclosure form signed.
03/09/99	Meetings & Presentations	John & Linda LaVine - Meeting for call center ISAM marketing opportunities. Non-Disclosure signed.
monthly/98	Meetings & Presentations	Paul Wagner - Financial advisor with monthly meetings. Paul would be glad to provide an affidavit if necessary.
dates unknown/98	Meetings & Presentations	Bill Perry - now Senior VP for CIGNA but considered a position with my company after leaving Lucent Technologies. Bill saw market need for ISAM. Several meetings in Indianapolis and many phone calls.
date unknown/98	Meetings & Presentations	Ron Beaumont - Chief Technology Officer for MCI WorldCom, Washington, D.C. headquarters.
dates unknown/98	Meetings & Presentations	Steve Johnson - SVP for MCI Worldcom Business Services. Several phone calls.
weekly/98	Meetings & Presentations	Pathway Technologies/Don Hornback - weekly and daily meetings in 1998. Shared office in 1999-2000.
dates unknown/98	Meetings & Presentations	Professor Rich Magjuka - IUPU at Indianapolis. Frequent meetings with ROS and Gary Price.
date unknown/98	Meetings & Presentations	Nelson Thibodeaux, CEO, Universal Directory Services, Inc., Hurst, Texas. Meetings with Gary Price, Professor Magjuka and ROS at Lewis and Kappes, 1998.
date unknown/98	Meetings & Presentations	Charlie Holder - Executive with Thomson Electronics. Six sigma 'ISAM' market research opportunity.
date unknown/98	Meetings & Presentations	Dr. Donald Brown - CEO, Interactive Intelligence, for software requirements and market opportunities for ISAM 'type' products.
date unknown/98	Meetings & Presentations	Alan Schmidt, math professor with discussion on sample size vs. confidence levels for ISAM. Don Hornback introduced.
date unknown/98	Meetings & Presentations	Scott Jones, Escient CEO and founder. RPQ discussion for ISAM. Don Hornback introduced.
dates unknown/98	Technical Design	Requirements for ISAM technical interface specifications for ACD switch/server, PBX, announcement system, database retrieval system and audio response units.
dates unknown/98	Technical Design	Technical random Nth sample and confidence level. A. McLellan, Don Hornback, and math PhD. Alan Schmidt (introduced by Don Hornback)
01/98 - 12/99	Legal	McLellan & Associates monthly review of any significant ISAM related recently issued patents.
01/98 - 12/99	Legal	Research on "is customer on-line notification required for ISAM recording" for state (Indiana) or Federal. S. Stuart - date? Several discussions with no documentation in file. Also discussed with G. Price but no letter. A number of G. Price billing invoices for this period but no specific ISAM reference.
1/22/99 & 9/14/99	Meetings & Presentations	James Schmidt of International Group. ROS, A. Miller, Steve Lee, Don Hornback, Gary Price and Paul Wagner in attendance. Market evaluation for ISAM in U.S. and Europe with investment required.
1997, 1998, 1999	Meetings & Presentations	Steve Lee - weekly meetings and discussions for venture capital opportunities.
2/98, 3/98	Technical Design	Requirement for ISAM 'ACD' circuits.
5/98, 6/98	Meetings & Presentations	Presentation slides for ISAM.
5/98, 6/98	Technical Design	ISAM voice recognition system
5/98, 6/98, 7/98	Technical Design	ISAM report system.
6/98 to 6/99	Meetings & Presentations	S. Walker, E. Feld, K. Berry - employment opportunities discussion. Meetings and phone calls.

7/8/98 - 7/13/98	Meetings & Presentations	D. Haynes & G. Gaucher meeting in Mackinaw, Michigan for strategy meeting and potential employment.
7/98 - 12/98	Market Research and Special Studies	CWA contract - ISAM analysis. A. Miller obtained copies of Ameritech and CWA Operator Services contracts. No contract language for 'monitoring' that would preclude ISAM. Calendar notes for A. Miller.
9/98 - 10/98	Market Research and Special Studies	TFDA ISAM Six Sigma defect rate for 1200 agents. A. Miller/E. Feld data analysis. Attached.
01/14/99	Meetings & Presentations	Greg Johnson, CMF -international ISAM technical advantages / India/Phillipines call centers- several meetings ensued
02/05/99	Meetings & Presentations	Michael Evans, CHORUS; Greg Johnson ISAM presentation and discussion
01/98 - 12/99	Legal	McLellan & Associates monthly review of any significant ISAM related recently issued patents.
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02/01/99	Meetings & Presentations	Charlie Holder - Executive with Thomson Electronics. Six sigma 'ISAM' market research international opportunities.
01/99-03/99	Technical Design	Emilie Feld - on-going data analysis for ISAM
01/11/99	Technical Design	A. Miller - market study for FOA candidates (approx. 3 week project)
1/11/1999 - 2000	Technical Design	Daily consultation with Pathway Technologies - ongoing ISAM development (shared office space)

ISAM

- Nth Sample Size
- Report Generation
- Identification
- Announcements
- On-Line Real Time
- Voice Recognition
  - Call Attendant
  - Customer
- Customer Announcement
- Data Collection
  - Customer Response
    - Speech to Text
    - Voice Recognition
- Customer Comments

ISAM

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ISAM Feature Requirements

1. Interface technical specifications for –
   - ACD switch
   - PBX
   - Servers
   - OEM database retrievals systems
   - OEM 'decision tree' announcement systems

2. 'Decision Tree' announcements

3. ISAM must monitor and communicate by sending and receiving various signals, codes and data at multiple points in the call path –

   - Announcement circuits
   - Incoming trunks
   - Calls waiting in Queue
   - Agent consoles (Agent ID, Call Disposition, etc.)
   - Audio Response Unit position release circuits
   - OEM database retrieval systems for call disposition data
   - Position disconnect but ISAM circuit connected to ISAM VR unit and data record

4. ISAM supervises and controls the PSTN customer call and monitor the agent – OEM database retrieval activity

   - ISAM survey post agent or ARU response
   - ISAM initial survey request at incoming trunk

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5. ISAM Announcement System

- Capacity for 1 to 20 different announcements
- Capacity for 1 to 20 incoming trunks
- Voice Recognition or customer keyed input for Yes-No approval to participate in survey
- Announcement length from ____ seconds to _____ seconds
- Remote access for new recording changes, addition or deletion of phrases
- Random selection for specific announcements
- Screening capability for VIP ANI customers, call type, trunk type, pre-selected NPA-NNX marketing, etc.
- Time, Day and Date parameters for ISAM operation

6. ISAM Data Recording

- Customer Yes-No response of initial 'decision' tree announcement for incoming trunk
- Voice Recognition and/or keyed customer input
- Data storage for key details –
    - Customer ANI
    - Time, Date
    - Agent ID
    - Call Type
    - Customer response voice recognition/keyed
    - Customer recorded message
    - Customer connection to manager

7. ISAM Report System

- Immediate cut-through and contact with manager
- Analysis by individual Agent, manager, team, office or system
- Analysis by individual customer, class of customer, call type
- Analysis by service item (courtesy, accuracy, overall service, speed of service, etc.)
- Control collection of data for multiple system by polling or data transmission at pre-selected times or thresholds
- Polling?

DATE: July 16, 1998

TO: Bob Stuart

FROM: Annette

Bob,

In our recent staff meeting at the Grand you asked us to consider firms that we felt might be the best potential clients for ISAM. I did some research and I think one good one to perhaps approach would be USAA. Best known as a major insurance company, they are also extensively involved in financial services. USAA is a Fortune 500 company with call centers around the U.S. and Europe.

August 12, 1998

R. O. Stuart
USADA, Inc.
5951 Camelback Court
Indianapolis, IN   46250

Bob,

ISAM

Sincerely,

AM:lc

McLELLAN & ASSOCIATES, Inc.

Post Office Box 501250
Indianapolis, IN   46250-1250

Alden McLellan IV Ph.D., P.E., M.B.A.   *Telephone: (317) 576-9900*
President

October 5, 1998

R. O. Stuart
President, USADA, Inc.
5951 Camelback Court
Indianapolis, IN   46250

Bob,

ISAM ███
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Sincerely,

Alden McLellan
President

AM:lc

McLELLAN & ASSOCIATES, Inc.

Post Office Box 501250
Indianapolis, IN   46250-1250

Alden McLellan IV Ph.D., P.E., M.B.A.   *Telephone: (317) 576-9900*
President

December 10, 1998

Mr. R. O. Stuart
President
USADA, Inc.
5951 Camelback Court
Indianapolis, IN   46250

Dear Bob,

ISAM
ISAM   ISAM

Sincerely,

Alden McLellan
President

AM:lc

ISAM ANNOUNCEMENTS
(Parameters)

SINGLE

- ISAM Greeting
- ISAM Instruction
- ISAM 'Quality' Question
- Customer Response
    - Keyed
    - Voice Recognition
- Customer Comment

MULTIPLE

- ISAM Greeting
- ISAM Instruction
- Random Selection of Question/Agent
- Customer Response
    - Keyed
    - Voice Recognition
- Customer Comment
- Remote 'Dial-Up' Recording

ISAM SIMULATION
(Requirements)

<u>Equipment</u>

- PC as ACD Server
- POTS Incoming Calls
- IVR Software
- Random Call/Announcement
- Multiple On-Line Agents
- Announcement Script
- Random Nth Sample
- Data Collection and Storage
- Report (Agent, Team, Call Center) Generation
- Data Polling
- Customer 'Keyed' Response
- Customer Key Word 'IVR'
- Customer 'Solicited' Comment/Recording
- Yes-No Decision Tree
- Customer 'Unsolicited Key Word' Queue Comments

11/98

ISAM FEATURES
(Post FOA)

Feature

- Interface with ICAP
  - Provide data for individual agent overall measurement of performance

- ISAM Intelligent Query
  - Selected survey question during high ASA quarter hours
  - Selected survey question for individual callers with high ASA
  - Selected survey questions for customers with 'regenerated' attempts
  - Selected survey question based on customer demographics
  - Selected survey question based on originating NPA-NNX

- ISAM Intelligent Report Generation
  - Correlation studies of agent performance vs. sales, customer retention
  - Correlation studies of agent productivity and customer satisfaction

USADA ISAM PRICING STRATEGY

The design, engineering, development, manufacturing, installation, marketing, training and maintenance expense and revenue for ISAM will be based on usage sensitive pricing. The call center client will easily relate value to work volume, number of agents, positions, position hours and ACD servers. The associated data is readily available and offers pricing flexibility for both fixed and variable expense.

The following tables illustrate the pricing options for a typical agent and call center. The assumptions used are 1320 position hours per agent per year, $14/hour wage rate, percent occupancy at 90, 1.8 agents per position, 250 agents per call center with an AWT range from 30 seconds to 10 minutes.

USAGE SENSITIVE ISAM RTU FEES
(Intangible Savings)

	Percent Savings*			
	1.0	2.5	5.0	10.0
RTU Fee/Call @ 30" AWT	.0005¢	.0013	.0027	.0054
60"	.0011	.0027	.0053	.0106
2'	.0021	.0053	.0106	.0212
5'	.0053	.0132	.0263	.0526
10'	.0105	.0263	.0526	.1052
RTU Fee/Pos Hr	.0442¢	.1105	.2206	.4412
RTU Fee/A/M	$6.33	15.75	31.58	63.17
FTU Fee/Position/M	$11.33	28.33	56.83	.113.67
Six Sigma Rev/Y/RTU Fee	18.9	47.3	94.7	189.4

Alternative (1) w/5% Productivity Increase

RTU Fee/30" Call	.001¢	=	$35,600
RTU Fee/Pos Hr	.050¢	=	16,500
RTU Fee/Agent/M	$10.00	=	30,000
RTU Fee/Pos/M	10.00	=	16,680
Annual Revenue			$98,780

Client Savings = $473,500

* Equivalent to 20% expense reduction.
Quality improvement with reduced customer turnover and increased market share

USADA EXPENSE REDUCTION SUMMARY

PRODUCT	TFDA	Annual Expense Savings Per Position	DA INDUSTRY	Per Position
PSR Voice Recognition of intervening call attendant vs. calling customer	$16.8 M	$15.5 K	$150.0 M	$ 6.0 K
CAPS Productivity system based on statistical standards and true cost for individual call attendants	$ 1.0 M	$ 1.4 K	$ 35.0 M	$ 1.4 K
ISAM Real time customer perception measurement for individual call attendants	Intangible	-	-	-
SDHFA				
- free training time	$ 1.1 M	$ 1.6 K	$ 40.0 M	$ 1.0 K
- percent occupancy New forcing algorithms that increases percent occupancy, converts idle seconds into free training hours and provides improved, more consistent service levels	$ 1.8 M	$ 2.7 K	$150.0 M	$ 6.0 K
OPERATIONAL EXPERIENCE ROS concepts of Force Strategy, Network Design, Management Information Systems, etc.	$ 20.2 M	$29.7 K	*	*
TOTAL	$ 40.9 M	$50.9 K	$325.0 M **	$14.4 K

* Internal AT&T benchmarks support a 35 percent savings vs. other AT&T large teams. Industry savings will vary depending on relative efficiency of each Directory Assistance entity.

** Does not include savings for large team operations in areas such as 800 in-bound, customer service or reservations. This market is four to five times the size of Directory Assistance. The analysis is limited to the U.S. market.

Proprietary: USADA, Inc.

USADA Product Summary

- **DFALT**

  An automatic force management system that converts idle time into productive hours with improved and consistence customer service at a lower cost.

  Potential Benefits

  > 5 – 15% increase in Percent Occupancy
  >
  > 40 hours per position freed for training or other productive work

- **ISAM**

  Measures customer satisfaction accurately and in real time from individual agent to corporate level.

  Potential Benefits

  > Six Sigma level quality on call center interactions
  >
  > Real-time data on individual agent, supervisor, manager, call center or division level performance

- **ICAP**

  An expert financial and productivity measurement system that tracks key performance items for all significant cost factors. Produces a true unit cost that applies for individual agents to corporate level.

  Potential Benefits

  > Cost reduction of $1500 per position through improved productivity
  >
  > Reduced management time for collection and analysis of data

- **PSR**

  A speech recognition system for individual agents to access databases and to control position consoles.

  Potential Benefits

  > Up to 50% reduction in average work time per query

INDIVIDUAL SERVICE ATTITUDE MEASUREMENT (ISAM)

The most essential and critical measurement for customer service industries, and the most difficult to obtain, is customer perception. The business as usual method of gathering data is to rely on polls, surveys and mail-out questionnaires. Each of these methods occurs well after the call has taken place, thus diminishing the value of the data. These methods fall in three vital management areas:

- Timeliness
- Accuracy
- Providing Individual Agent Information

These methods do not capture "right now" customer perceptions and management is thus hindered in acquiring timely, accurate and individual data on how well they are meeting their customers' expectations.

The issue of individual agent data can be particularly useful because studies have shown that poor service experiences can be attributed to less than 2% of the team. But management typically has no way to identify the poor performing 2%. The problems of a few customer contact employees can taint the results of the entire team.

ISAM solves this by providing real-time opportunities for customers to give feedback on their experience. At the end of the call, a recorded announcement comes on line to ask the customer to provide responses to specific questions through entries on their touchtone pad. Additionally, customers are given the opportunity to record their own message with more detailed information.

The digital responses and recorded feedback are then assembled into reports for both management and the operator. Data is now timely, focused and usable to help correct specific performance issues not only for each individual agent, but also in call center management, and can provide feedback on issues for the entire company.

ISAM will allow call centers to achieve six sigma levels of performance through reduction of defective customer interactions. And, reduce management time and costs for capturing, interpreting and using performance data.

Individual Service Attitude Measurement

Service Goal

- Six Sigma Service
  - 3.4 defects per million in calls
    or .00034%

Individual Service Attitude Measurement

Six Sigma Service Study

- 1200 agents with 239 million annual calls
- Known call defect rate of .17%
  - 1700 defects per million calls
  - 400K plus defects per year
    - Antagonistic
    - Argumentative
    - Customer cut off

Individual Service Attitude Measurement

Study Findings

- 95% of agents had zero defects
- 3.7% defect rate for 1% of agents
  - Equivalent to 37,000 bad calls per million
  - Only 12 agents caused 22% of the service problem

Individual Service Attitude Measurement

Study Findings

- 95% of agents had zero defects
- 3.7% defect rate for 1% of agents
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  - Only 12 agents caused 22% of the service problem
- 99.8% Required Improvement

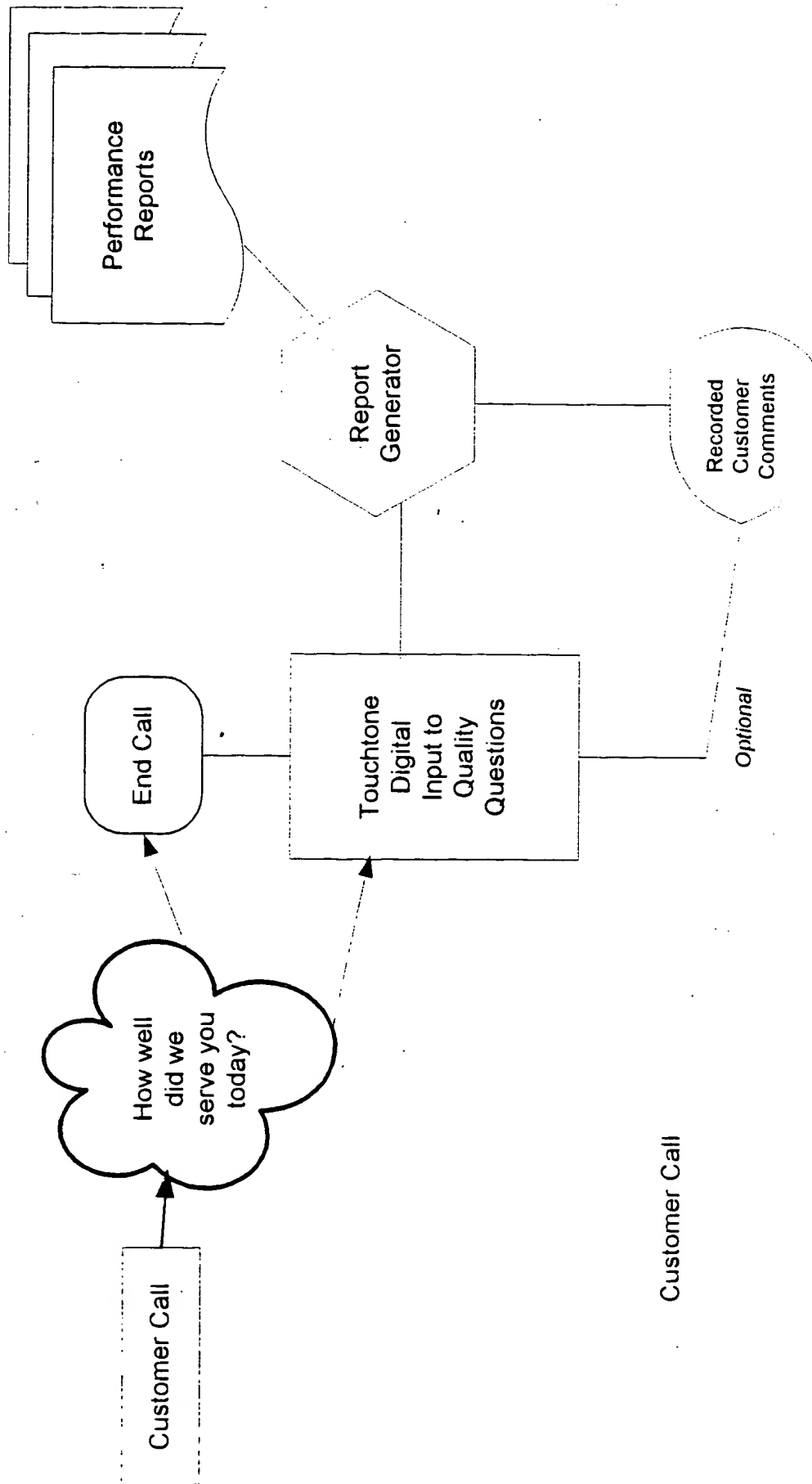# *Individual Service Attitude Measurement (ISAM)*

Why Six Sigma service?

- Poor service quality is reason most customers switch to competitor

- Firms with superior service grow about twice the rate as their competitors

- Good service lowers cost of doing business by eliminating rework

Individual Service Attitude Measurement

Why is customer service typically poor?

- Customer perception is difficult to measure
  - Subjective
  - Delayed
  - Costly
  - Inaccurate

- No specific measurement for individual agents

USADA, Inc.

INDIVIDUAL SERVICE ATTITUDE MEASUREMENT (ISAM)

Performance Reports

Report Generator

Recorded Customer Comments

End Call

Touchtone Digital Input to Quality Questions

How well did we serve you today?

Customer Call

Customer Call

Optional

Individual Service Attitude Measurement (ISAM)

- Announcement requests customer to rate service

- ACD server or ISAM feature

  - Selects random call

  - Tracks agent call sample

  - Selects from menu of questions

  - Identifies agent ID

  - Identifies call class, type, etc.

  - Accumulates customer response and comments

  - Generates individual, team and Center reports

- ISAM operates real time

ISAM

- Individual agents 'personal service' report card

- Accurate, real time customer perception of service, practice, products, prices, advertising, etc.

- Analysis of customer 'Queue comments'

- Reduce customer loss rate

- Eliminate 15 to 20% of management time for quality checks

- Eliminate census quality announcements

- Six sigma quality for call centers

ISAM SERVICE QUESTIONS

Category	Example	Avg Seconds

1) Initial

"Company Name is greatly interested in your evaluation of our service for this call"

"If you would like to participate please key 1 for Yes or 2 for No."

or

"If you would like to participate please say Yes or No."

2) Agent

"Was the agent helpful?"

"Was your agent courteous?"

3) Product Manager

"Did you obtain the information you wanted?"

"How satisfied are you with our product, price, etc.?"

"Did you see our ad in _____ today's ._____?"

4) Service

"Did we answer this call in a timely manner?"

"Were you able to reach the agent on your first attempt?"

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4) Service	"Did we answer this call in a timely manner?"	
	"Were you able to reach the agent on your first attempt?"	
5) General	"How well did we serve you today?"	